

Introduction to IRB in myUABResearch

Video Presentation Transcript

[Presenter]: Welcome to an introduction to IRB.

[Presenter]: In the next few minutes, you will learn how to quickly navigate the IRB workspace, so you can find your studies, understand what action is needed, and complete common tasks with confidence.

[Presenter]: We will start in the dashboard, then move on to the HRPP Toolkit, then how to open a submission, view history, finding previous submissions, and filters.

[Presenter]: When you log in, you will land on your dashboard.

[Presenter]: Think of this as your home base and the fastest way to see what needs attention and jump back into recent work.

[Presenter]: Here are some things to look out for.

[The presenter mouses over each item: My Inbox, My Reviews, Ancillary Reviews.]

[Presenter]: Starting with My Inbox; this is your action list. Items that require something from you will appear here.

[Presenter]: My Reviews and Ancillary Reviews – this is where you can see items assigned to you to review. This is a subset of what you will see in My Inbox.

[Presenter]: On the left you will see the Create menu and buttons.

[The presenter clicks on the Create button to open a drop-down menu of items.]

[Presenter]: These are the actions you can take, such as Create New Study and Report New Information.

[Presenter]: If you don't have access to any "create" actions, you might not see this menu at all.

[Presenter]: The Recently Viewed area is your quick return area.

[Presenter]: Under Recent, you will see the last several items you opened.

[The presenter clicks on the Pinned subheading under Recently Viewed items.]

[Presenter]: Under the Pinned section, you can pin items you return to often so they stay easy to access.

[Presenter]: Over on the right, you will see the gear icon.

[The presenter mouses to the far right of the dashboard to a gear/cog icon and clicks on it. A slide-in panel opens showing Displayed Fields that can be reordered as well as additional paging and sorting options.]

[Presenter]: This is where you can personalize the table.

[Presenter]: You can move different fields up or down in order to see them in a different order.

[Presenter]: Now, I will show you how to access and navigate the HRPP Toolkit.

[Presenter]: The toolkit is a library of documents that you can reference when creating and reviewing a study or conducting a meeting.

[Presenter]: You will click on the IRB tab, then the Library tab.

[Presenter]: Here you can see all of the different documents.

[The presenter clicks through all of the tabs listed under the IRB Library in the following spoken order.]

[Presenter]: There are standard operating procedures, investigator manuals, work sheets, checklists, and templates.

[Presenter]: These can all be downloaded, filled out, and uploaded as a supporting document.

[The presenter leaves the IRB Library and navigates back to the main IRB dashboard.]

[Presenter]: Now we will review the task of opening a submission.

[Presenter]: There are two ways to do this.

[Presenter]: The first is from My Inbox, where you click on the submission name.

[Presenter]: The second is by going to the IRB tab, then Submissions, then clicking on the submission name here.

[In this context, the presenter is referring to the table listing of submissions. The name of each submission is a blue underlined hyperlink that will open the submission when clicked.]

[Presenter]: Use the State feature right here in order to understand what state the submission is in.

[The presenter is referring to the State column of the table listing submissions. Examining the values in the State column may be used to inform decisions on next actions to take.]

[Presenter]: This is your clue for what action is needed.

[Presenter]: For example, if you see “Pre-Submission” that typically means the study has not submitted yet.

[Presenter]: Let’s take a view at one of the studies.

[The presenter clicks on the name of one of the listed studies to open it. This navigates them to the workspace of the submission.]

[Presenter]: Here is an example of a study workspace.

[Presenter]: In the middle, you can see the study workflow (flowchart diagram), as well as the state that the study is currently in.

[Presenter]: At the top is the breadcrumb trail. You can use this to return to the submissions page.

[Presenter]: On the left, here, you can see all of the actions that you perform on the study, such as assigning the study to a meeting or adding a comment.

[Presenter]: If you need to confirm what happened, when it happened, or who added what to the study, click on the History tab at the bottom.

[Presenter]: This tab shows activity on the submission including comments, attachments, and any correspondence that has been added.

[Presenter]: So it’s a great first stop if you’re troubleshooting or catching up.

[Presenter]: Now let’s review how to find a previous submission.

[Presenter]: We’re going to return to the (IRB) submissions page.

[The presenter clicks on Submissions in the breadcrumbs at the top of the workspace.]

[Presenter]: And from here, we’re going to use the tabs narrow down what we are looking for.

[The presenter clicks through each of the pre-filtered submissions tabs, naming them in order and describing them as follows.]

[Presenter]: So, the In-Review tab is going to be submissions currently undergoing IRB review.

[Presenter]: In the Active tab, we can see all approved submissions plus external IRB, non-human research, human research not engaged, lapsed, and suspended submissions.

[Presenter]: Under New Information Reports, we can see any submissions in the state.

[Presenter]: Under External IRB, here are the studies managed by an external IRB.

[Presenter]: For Relying Sites, these are participating sites relying on the local IRB as the Single IRB of record.

[Presenter]: Under All Submissions, you can see every submission you can access in any state.

[Presenter]: In the Archived section, you can see closed, disapproved, discarded, and terminated submissions.

[Presenter]: Now, I will show you how to filter tables to quickly find what you need.

[Presenter]: Many pages include tables that you can filter to quickly locate a study ID or other details.

[Presenter]: We're going to start by selecting the column that you want to filter by.

[Presenter]: So I will go to the In-Review tab.

[The presenter navigates back to the In-Review tab under IRB Submissions.]

[Presenter]: Now, I will start by selecting the Name because I want to filter by Name.

[Directly below the In-Review tab a dropdown menu, text search box, search button, and a link to Add Filter and Clear All filters. The presenter clicks the dropdown menu to select the Name field to filter submissions by Name.]

[Presenter]: I am going to use this one as an example, so I am going to start by typing "submit" and then click the Search feature.

[The In-Review submissions screen refreshes. The table of submissions shrinks to show a single submission matching the aforementioned search term.]

[Presenter]: Now you can see, this pops up.

[Presenter]: Now let's say you don't know the exact name of the study, but you know part of it.

[Presenter]: So we're going to type percent sign and pSite ("%pSite%"), and now I will click Search.

[Presenter]: And you can see it still pulls this up.

[The same submission from the first search reappears after the second search. The second search utilized the percent symbol as a wildcard for partial matches.]

[Presenter]: If you're not sure what formats are allowed, you can click on the Help feature right here, and you can see some helpful text to help you search.

[The help feature is denoted by a blue circular question mark icon adjacent to the Filter by label and the dropdown menu for selecting fields to filter by. Clicking on the icon opens a callout box providing detailed guidance on the types of filtering available to users. For example, you may filter by text, filter by dates and date ranges, compare values, and use Boolean operators.]

[Presenter]: To combine multiple criteria, you click the Add Filter feature here, and you can add multiple criteria.

[Presenter]: And in order to clear this and go back to the regular view, just click Clear All.

[Presenter]: This been an introduction into navigating the IRB system.

[Presenter]: For additional information, please visit the myUABResearch Training webpage.

[The myUABResearch Training webpage is available at the following address:

<https://www.uab.edu/research/home/myuabresearch/knowledge/training>]